

Sentiment & Behaviours - July update

THE DEPARTMENT OF THE PRIME MINISTER AND CABINET

BACKGROUND

There is a need to understand ongoing sentiment and behaviours throughout 2021.

The vaccine rollout is now underway. As remaining groups become eligible to vaccinate, there will be a need to continue to keep people informed so they know what to do when it's their turn.

While New Zealand continues to enjoy many freedoms, these freedoms are interpreted in the context of how other countries are progressing. There is an increasing need to manage expectations around the speed of the roll out and communicate the timeframe to our 'new normal'.

This report provides a check-in on overall sentiment and compliance behaviours of New Zealanders to inform communications, tone and messaging, and creative direction to help keep New Zealanders engaged with the collective mission to Unite Against COVID-19.

OVERALL OBJECTIVES

Understand how to keep New Zealanders engaged with the collective mission - Unite Against COVID-19.

The specific number objectives we set out to answer this time:

1. **Explore the sentiment towards the COVID-19 response** – how are people feeling about COVID-19 personally, and how we are handling the response as a country.
2. **Understand motivations for compliance** – what will keep people engaged overall and with specific actions they have been asked to do.
3. **Information and influencers** – understand the effectiveness of information and the key sources of influence.
4. **Brand effectiveness** – how is Unite Against COVID-19 performing as a brand, what are the strengths and areas of focus.

Methodology

This survey interviewed a nationally representative sample of New Zealanders aged 16 years and over.

- n=827
- Margin of error at 95% confidence interval +/- 3.41%

Fieldwork ran from July 19 to July 29.

Key samples:

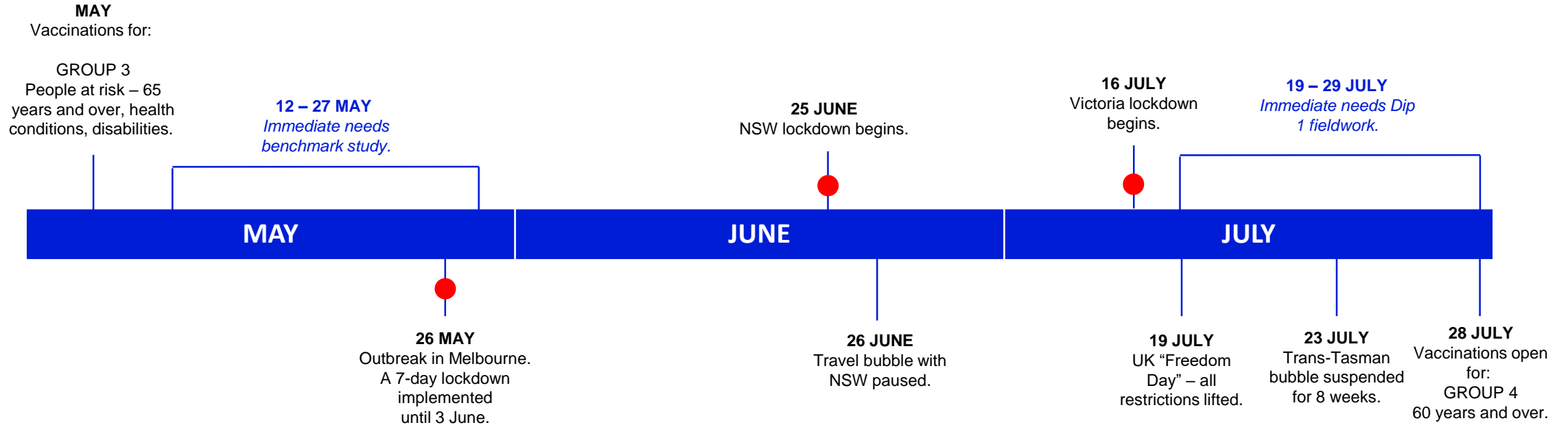
- Māori n=70
- Pasifika n=50

The data was post weighted to be representative of the New Zealand population, in terms of age, gender, region and ethnicity.

Throughout this report key comparisons are made to the May 2021 Benchmark study.

It is important to note that this is an online survey – people who do not have access to the internet are not represented in our findings.

Timeline of key events



A more detailed timeline of events from January is included in the appendix.

Agenda

1



**Understanding
the sentiment
towards COVID-19**

2



**Vaccine
intentions &
behaviours**

3



**Health behaviour
compliance &
motivations**

4



**Brand &
information**



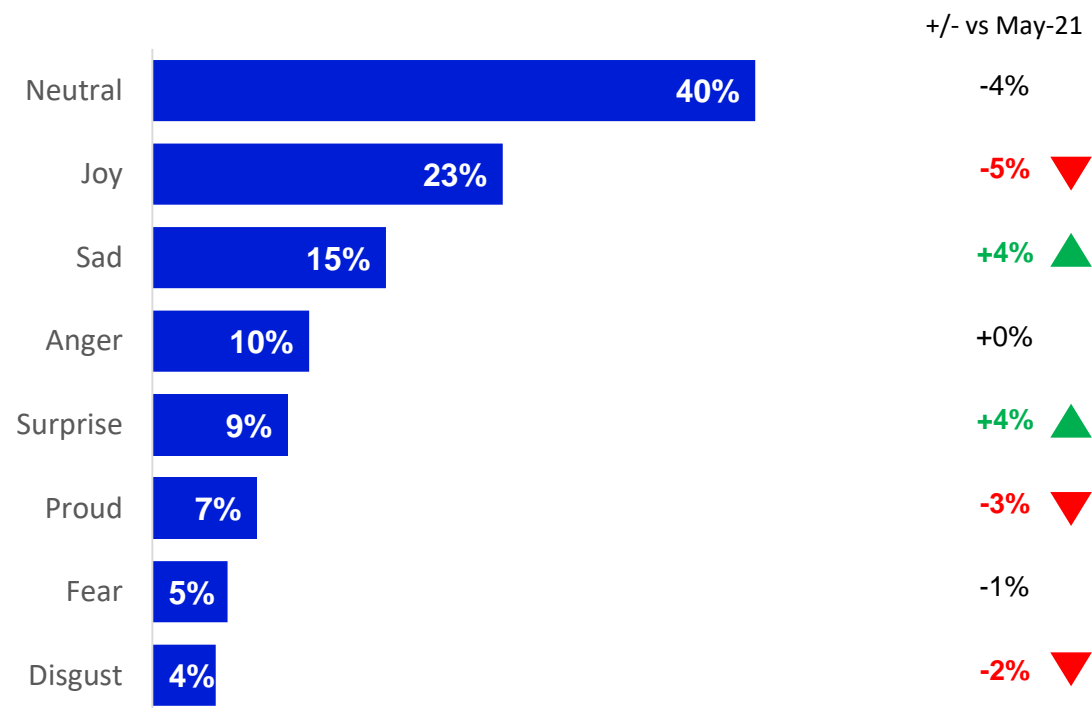
Understanding the sentiment towards COVID-19

TRA



In May people were feeling quite passive about the COVID-19 situation, this is still the case but we starting to see sentiment drop slightly

Neutral continues to be the dominant emotion that people feel towards the COVID-19 situation in New Zealand, but we have seen a significant decrease in joy and pride.

SENTIMENT TOWARDS THE COVID-19 SITUATION IN NZ



Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)
 Q: What are your emotions at the moment regarding the situation with COVID-19 in New Zealand?
 Base: July-21 total sample n=827, May-21 total sample n=1853

  Significantly higher / lower than May-21

Over two thirds believe we are going in the ‘right direction’ with the COVID-19 response - a slight decline since May

HOW DO YOU FEEL THE COUNTRY IS HANDLING THE IMPACT OF AND RESPONSE TO COVID-19?

The belief that we are going in the ‘right direction’ has declined significantly, while ‘not sure’ and ‘wrong direction’ have experienced a significant increase.

		+/- vs May-21
RIGHT DIRECTION	69%	-6% ▼
WRONG DIRECTION	15%	+3% ▲
NOT SURE	16%	+3% ▲

Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)
 Q: How do you feel the country is going with handling the impact of and response to COVID-19?
 Base: July-21 total sample n=827, May-21 total sample n=1853

▲ ▼ Significantly higher / lower than May-21

The speed of the vaccine rollout is the main driver behind those who believe we are heading in the wrong direction

Those with a negative sentiment are concerned by the speed of the vaccine rollout.

NEGATIVE SENTIMENT - WHY DO YOU FEEL THIS WAY?

“Not enough people are vaccinated and it’s taking too long to vaccinate people”

“The slow rollout of the vaccine”

“Vaccination rollout (11% vaccinated) is a disaster. After 17 months no national vaccination register. No plan to open fortress NZ. Lots of talk - very little action”

“The progress for vaccination was absolutely unacceptable”

“NZ is way too late with vaccinations. If new variants arrive we are too late.”

“Angry at vaccine rollout...hopeless!!! Let us travel.”

15% FEEL NZ IS GOING IN THE WRONG DIRECTION

OF THESE...

67% are likely to think the COVID-19 vaccine rollout is going **badly**

34% are also concerned that NZ is becoming more **isolated**

Source: Immediate Needs Dip 1 (July 2021)

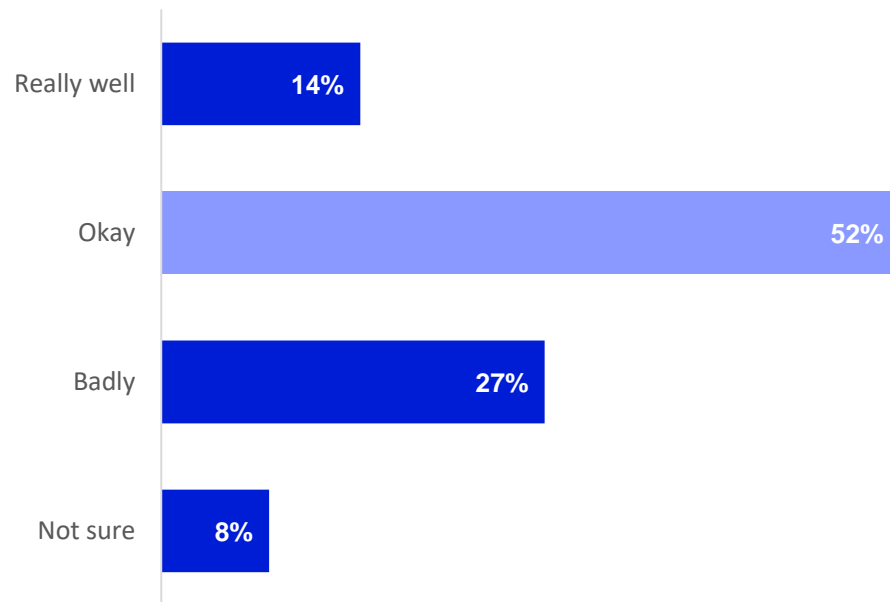
Q: And why do you feel this way?

Q: How do you feel the country is going with handling the impact of and response to COVID-19?

Base: July-21 those who feel we're going in the wrong direction n=132

Two thirds of New Zealanders feel the vaccine rollout is going really well or okay, but over a quarter think it is going badly

PERCEPTIONS OF THE COVID-19 VACCINE ROLLOUT



Males 55 years and over (38%) and those with \$150k+ income (37%) are significantly more likely to feel that the **vaccination rollout is going badly**.

Source: Immediate Needs Dip 1 (July 2021)
Q: How well do you think the COVID-19 vaccine rollout is going in New Zealand?
Base: July-21 total sample n=827

There is a growing expectation that we will return to the pre COVID-19 state once the majority are vaccinated

Although most New Zealanders still expect there to be some day-to-day differences and to have to undertake some health behaviours.



Those expecting everything to return to the pre COVID-19 state are significantly more likely to be:

- Males aged 16-34 years (31%)
- Asian ethnicity (31%)
- Full time employees (25%)

FUTURE EXPECTATION OF COVID-19 HEALTH BEHAVIOURS

		+/- vs May-21
I expect to continue to undertake health behaviours	36%	=
I expect there will be some differences in day to day life compared to pre COVID-19	39%	-8% ▼
I expect everything to be back normal (pre COVID-19)	18%	+9% ▲

Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)
 Q: What do you think life will be like in New Zealand once the majority of New Zealanders are vaccinated against COVID-19? Key: I expect to continue to undertake health behaviours - ie: scanning, wearing a mask on public transport
 Base: July-21 total sample n=827, May-21 total sample n=1853

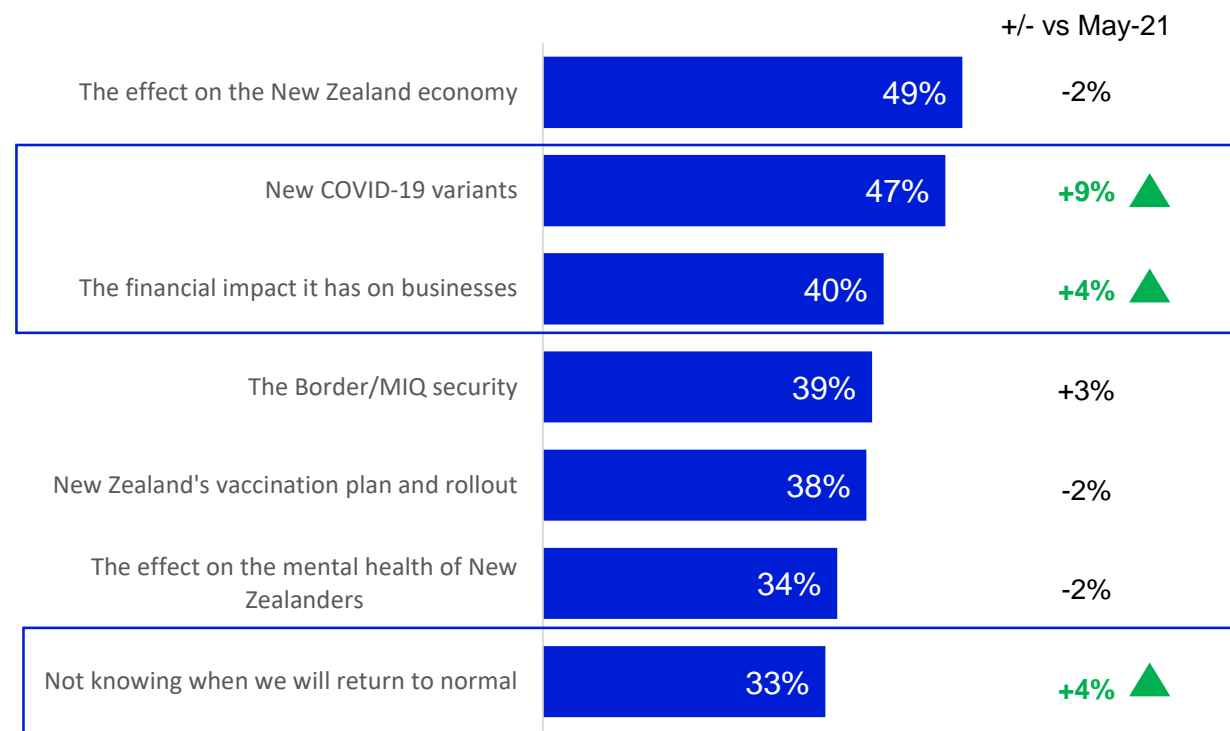
  Significantly higher / lower than May-21

While the impact on the NZ economy remains top of mind, concern around new COVID-19 variants is increasing

Concern around **new COVID-19 variants** has become significantly more top of mind.

We also see a significant increase in concerns around the financial impact of COVID-19 on businesses and not knowing when we will return to normal.

TOP OF MIND IMPACTS OF COVID-19 ON NEW ZEALAND

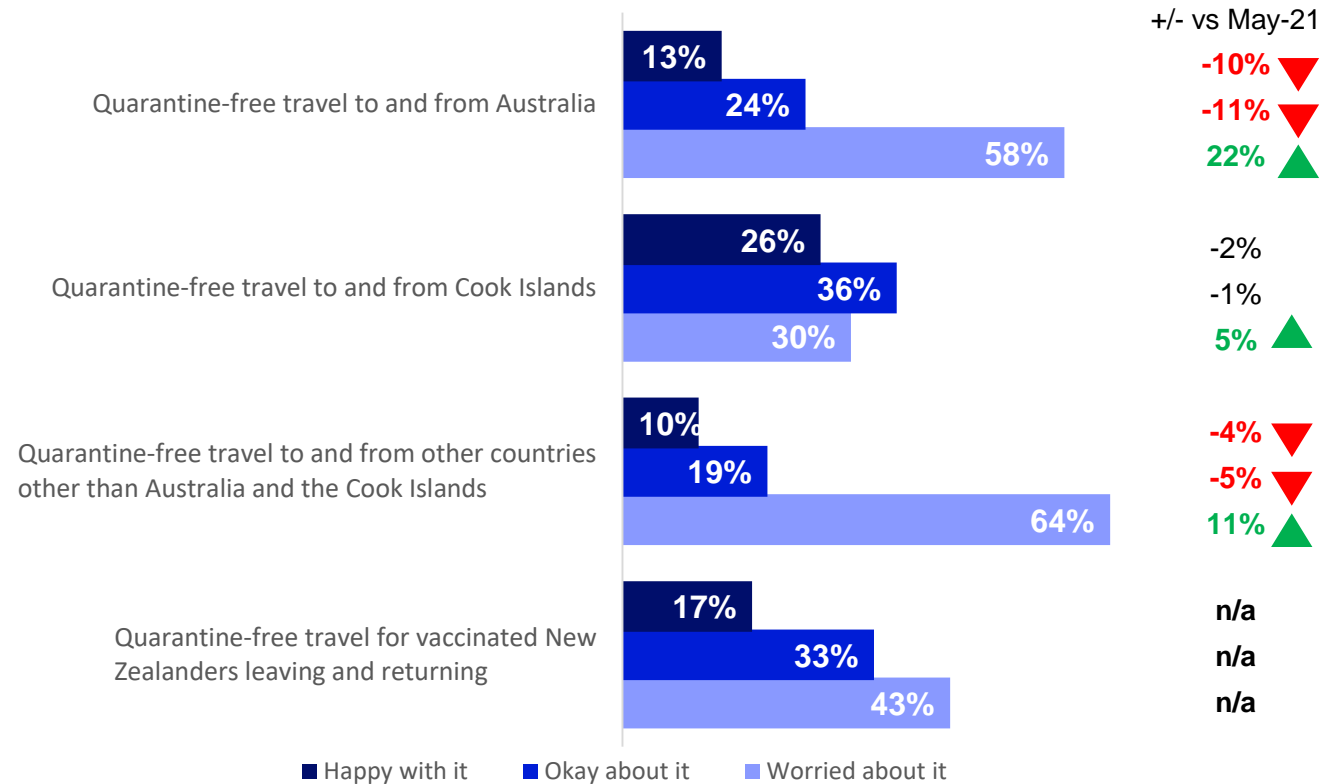


Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)
 Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?
 Base: July-21 total sample n=827, May-21 total sample n=1853

We are becoming more anxious about quarantine-free travel, particularly to Australia, following the recent outbreaks

While Australia is the main concern, we are also concerned about quarantine-free travel to and from the Cook Islands, and other countries.

SENTIMENT TOWARDS QUARANTINE-FREE TRAVEL



Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)
 Q: How do you feel about the following... <STATEMENT>
 Base: July-21 total sample n=827, May-21 total sample n=1853

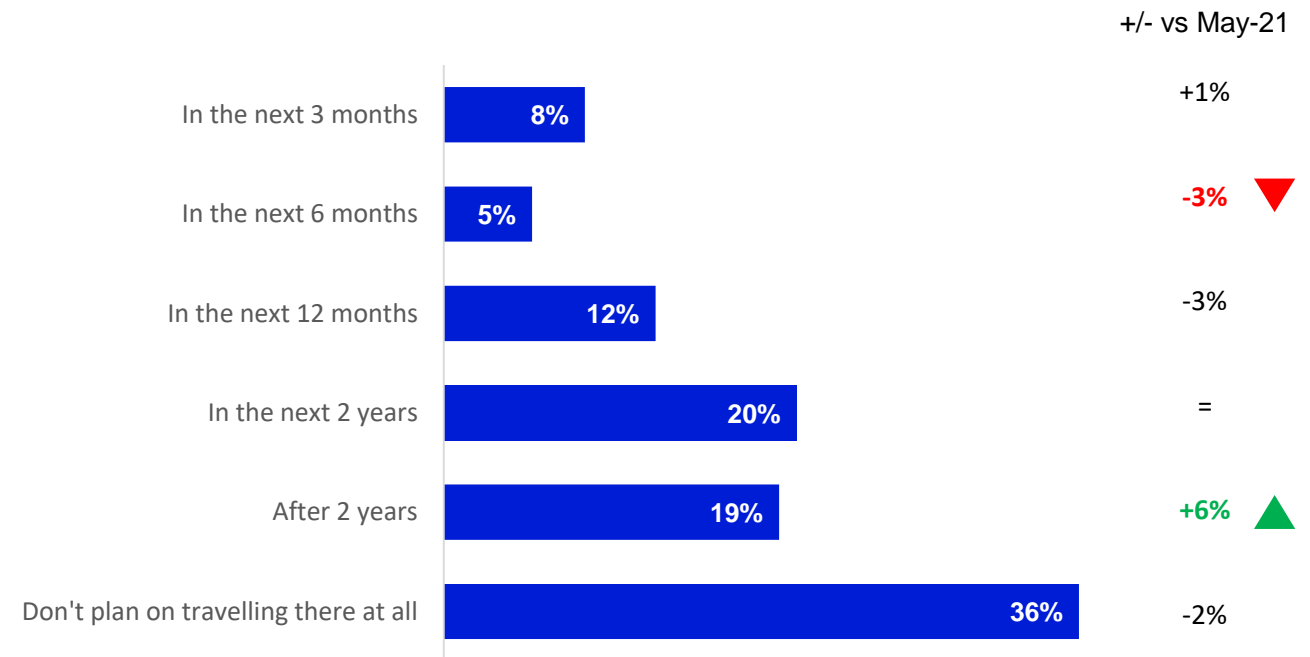
Significantly higher / lower than May-21



While travel intention to Australia is holding, expected travel timelines are longer

We have seen a significant decrease in the number of people who are intending to travel to Australia in the next 6 months.

This is coupled with a significant increase in the number of people who are intending to travel after 2 years.

INTENTIONS TO TRAVEL TO AUSTRALIA



  Significantly higher / lower than May-21

Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)

Q: Do you plan on travelling to...?

Base: July-21 total sample n=827, May-21 total sample n=1853

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IMPLICATION

While New Zealanders are wanting to see progress, we are also still concerned about anything that could risk our position

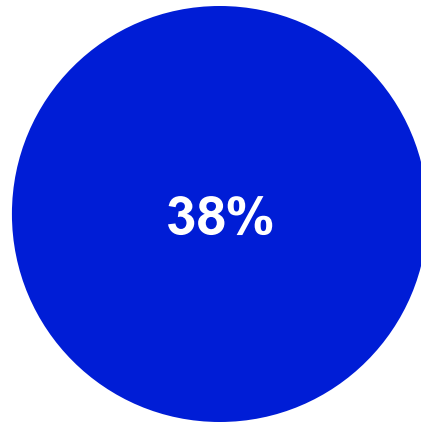
Vaccine intentions & behaviours

2

TRA

The COVID-19 vaccine is a key concern for New Zealanders

With the vaccination plan and rollout for New Zealand ranking #5 on the list of impacts of COVID-19 in New Zealand.



Of New Zealanders are thinking about the COVID-19 vaccine plan and rollout

Those for who the vaccine is top of mind are significantly more likely to be:

- 55 years and over (50%)
- Retired (51%)
- New Zealand European (43%)
- \$100k income (54%)
- Working in professional services (50%)

They will be likely to have the means to travel, and are likely to be eligible for the vaccine now, or very soon.

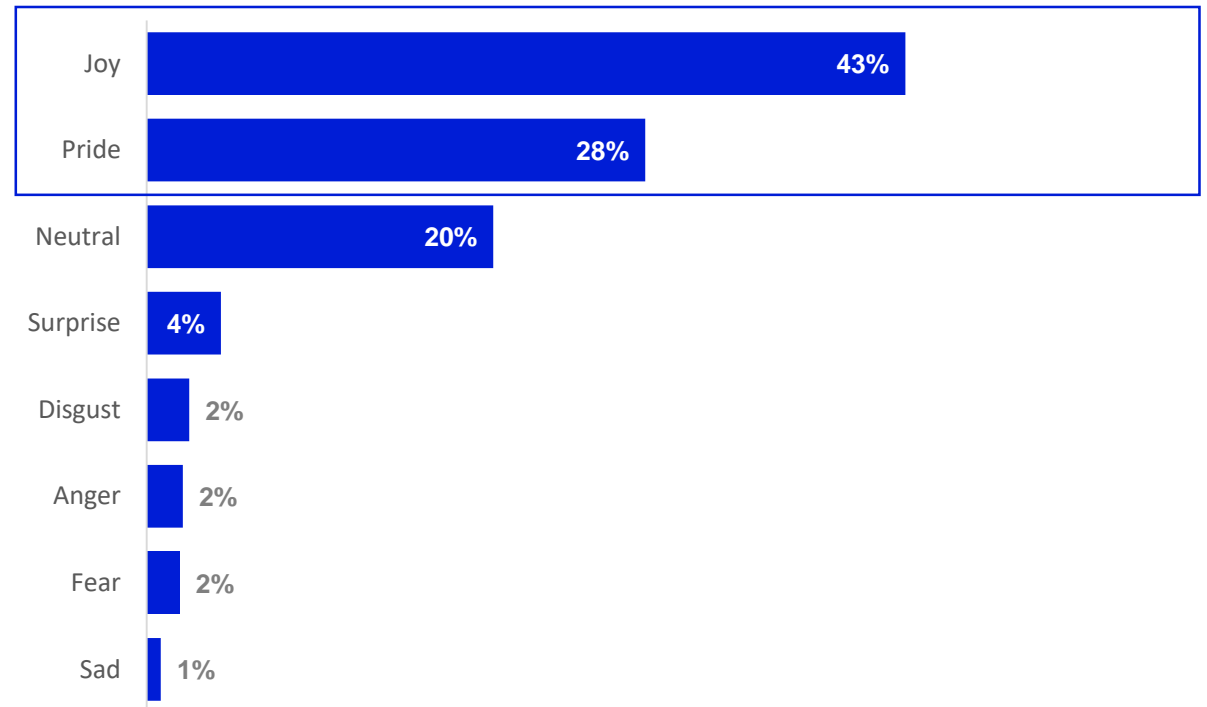
Overall, there is a positive view towards a world where the majority of New Zealanders are vaccinated

Although, one in five New Zealanders are feeling neutral

New Zealanders top emotions are joy and pride.

We see very little negative emotion associated with a New Zealand where the majority are vaccinated against COVID-19.

EMOTIONS TOWARDS A NEW ZEALAND WHERE MAJORITY ARE VACCINATED



Source: Immediate Needs Dip 1 (July 2021)

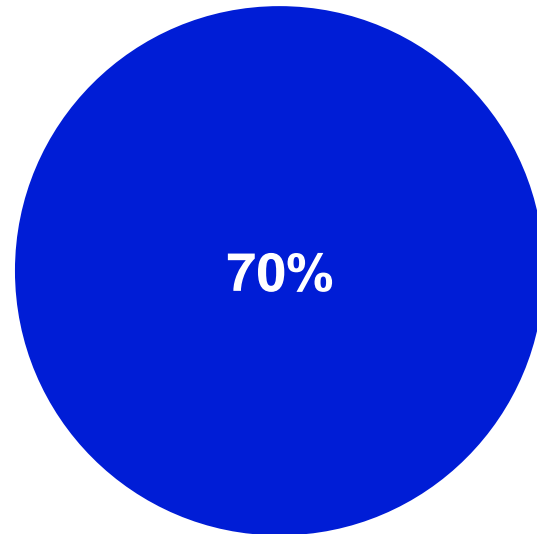
Q: Imagine a world where the majority of New Zealanders are vaccinated against COVID-19. How does this make you feel?

Base: July-21 total sample n=827

And New Zealanders expect that 70% of the population will get vaccinated

This is in line with other countries vaccination targets

NEW ZEALANDERS EXPECTATIONS OF COVID-19 VACCINE UPTAKE IN NEW ZEALAND



Expectations of vaccine uptake are significantly higher for those who are already eligible for the vaccination:

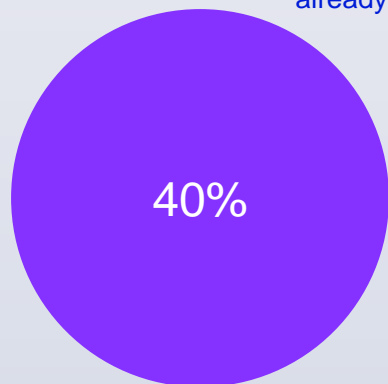
- 55 years and over (77%)
- Retired (77%)

Source: Immediate Needs Dip 1 (July 2021)
Q: What percentage of New Zealanders do you think will get vaccinated for COVID-19?
Base: July-21 total sample n=827

Most New Zealanders intend to get vaccinated for COVID-19

HAVE YOU ALREADY BEEN OFFERED THE COVID-19 VACCINE? DO YOU INTEND TO GET THE VACCINE?

74% of New Zealanders over 16 years are either already vaccinated or likely to get vaccinated



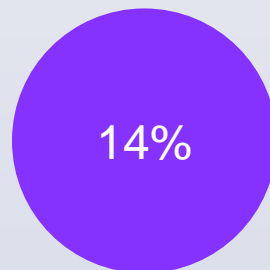
VACCINATED OR PENDING

Had two doses + had one dose + have not had first dose but appointment is booked



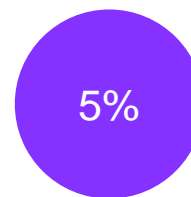
GOOD TO GO

"Definitely" getting the COVID-19 vaccine



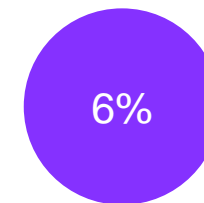
OKAY WITH IT

"Most likely" + "likely" getting the COVID-19 vaccine



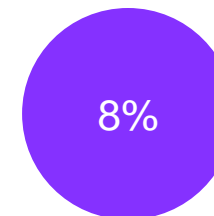
UNLIKELY

"Unlikely" + "most unlikely"



UNENGAGED

"I'm really not sure" + "rather not say"



REJECTORS

"Definitely not" getting the vaccine + "declined / I will decline" the vaccine

Source: Immediate Needs Dip 1 (July 2021)
 DPMC July 2021 Vaccination Segmentation Framework
 Q: Have you already been offered an opportunity to get your COVID-19 vaccination?
 Q: Do you intend to get the COVID-19 vaccine?
 Base: Total Sample n= 827, Vaccinated or pending n=333, , Good to go n=175, Okay about it n=114, Unlikely n=41, Unengaged n=53, Vaccine rejectors n=56

A further 7% that have not had the first dose and have not booked an appointment.

The *Unengaged* group are not sure what life will be like once majority of New Zealanders are vaccinated

	TOTAL	GOOD TO GO	OKAY WITH IT	UNLIKELY	UNENGAGED	REJECTORS
Had someone close to them get the vaccine	65%	63%	68%	50%	39% ▼	51% ▼
Information quality – Told all they need to know	56%	60%	54%	20% ▼	30% ▼	19% ▼
Information access – Agree they have access to all they want / need	53%	61% ▲	49%	16% ▼	23% ▼	18% ▼
Listen to Government / Healthcare Professionals on vaccine information	75%	85% ▲	75%	46% ▼	52% ▼	43% ▼
Listen to 'no one' on vaccine information	12%	9%	16%	34% ▲	22%	30% ▲
Positive emotions towards a world where majority of New Zealanders are vaccinated	67%	84% ▲	63%	14% ▼	38% ▼	28% ▼
Not sure what life will be like once majority of New Zealanders are vaccinated	7%	5%	8%	17%	28% ▲	14%

Source: Immediate Needs Dip 1 (July 2021)

DPMC July 2021 Vaccination Segmentation Framework

Q: Have you already been offered an opportunity to get your COVID-19 vaccination?

Q: Do you intend to get the COVID-19 vaccine?

Base: Total Sample n= 827, Vaccinated or pending n=333, , Good to go n=175, Okay about it n=114, Unlikely n=41, Unengaged n=53, Vaccine rejectors n=56

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▲ ▼ Significantly higher / lower than total sample

TRA

The challenge will be influencing different age groups to get vaccinated when it's their turn

VACCINE SEGMENTS – BY AGE GROUPS

	TOTAL	VACCINATED OR PENDING	GOOD TO GO	OKAY WITH IT	UNLIKELY	UNENGAGED	REJECTORS
55 years and over	34%	51% ▲	22% ▼	12% ▼	18% ▼	15% ▼	34%
45 to 54 years	17%	12% ▼	13%	29% ▲	16%	32% ▲	24%
35 to 44 years	15%	11%	23% ▲	11%	14%	19%	16%
25 to 34 years	18%	14%	22%	26%	33% ▲	16%	9% ▼
16 to 24 years	16%	12%	20%	22%	19%	17%	17%

Source: Immediate Needs Dip 1 (July 2021)

DPMC July 2021 Vaccination Segmentation Framework

Q: Have you already been offered an opportunity to get your COVID-19 vaccination?

Q: Do you intend to get the COVID-19 vaccine?

Base: Total Sample n= 827, Vaccinated or pending n=333, , Good to go n=175, Okay about it n=114, Unlikely n=41, Unengaged n=53, Vaccine rejectors n=56

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▲ ▼ Significantly higher / lower than total sample

TRA

45 to 54 year olds have a less positive sentiment towards the vaccine than other age groups

	TOTAL SAMPLE	16- 24 YEARS	25 - 34 YEARS	35 – 44 YEARS	45 - 54 YEARS	55 YEARS +
SENTIMENT TOWARDS VACCINE	Positive emotions (67%) Neutral (20%) Negative emotions (6%) <i>Largest emotion is Joy (43%)</i>	Positive emotions (66%) Neutral (13%) Negative emotions (6%) <i>Largest emotion is Pride (35%)</i>	Positive emotions (65%) Neutral (22%) Negative emotions (9%) <i>Largest emotion is Joy (44%)</i>	Positive emotions (70%) Neutral (17%) Negative emotions (9%) <i>Largest emotion is Joy (42%)</i>	Positive emotions (55%) Neutral (29%) Negative emotions (9%) <i>Largest emotion is Joy (38%)</i>	Positive emotions (73%) Neutral (18%) Negative emotions (3%) <i>Largest emotion is Joy (50%)</i>
EXPECTATION	Expect there to be small differences (39%) Expect to continue to undertake health behaviours (36%) Expect everything to go back to normal (18%)	Expect everything to go back to normal (37%) Expect there to be small differences (28%) Expect to continue to undertake health behaviours (26%)	Expect there to be small differences (37%) Expect to continue to undertake health behaviours (36%) Expect everything to go back to normal (21%)	Expect to continue to undertake health behaviours (38%) Expect there to be small differences (32%) Expect everything to go back to normal (21%)	Expect to continue to undertake health behaviours (41%) Expect there to be small differences (38%) Expect everything to go back to normal (12%)	Expect there to be small differences (48%) Expect to continue to undertake health behaviours (38%) Expect everything to go back to normal (10%)

Source: Immediate Needs Dip 1 (July 2021)

Q: What are your emotions at the moment regarding the situation with COVID-19 in New Zealand?

Q: Imagine a world where the majority of New Zealanders are vaccinated against COVID-19. How does this make you feel?

Q: What do you think life will be like in New Zealand once the majority of New Zealanders are vaccinated against COVID-19?

Base: Total Sample n= 827, 16-24 years n = 56, 25-34 years n = 200, 35-44 years n = 159, 45-54 years n = 109, 55 years + n = 303

45 to 54 year olds also have fewer information sources than other age groups

	TOTAL SAMPLE	16- 24 YEARS	25 - 34 YEARS	35 – 44 YEARS	45 - 54 YEARS	55 YEARS +
TOP INFORMATION SOURCES	Articles in the news / media (48%)	Articles in the news / media (37%)	Articles in the news / media (44%)	Media briefings (37%)	COVID-19 advertising (47%)	Articles in the news / media (64%)
	COVID-19 advertising (45%)	COVID-19 advertising (37%)	Media briefings (41%)	COVID-19 advertising (37%)	Media briefings (40%)	COVID-19 advertising (55%)
	Media briefings (42%)	COVID-19 website (37%)	COVID-19 advertising (39%)	Articles in the news / media (36%)	Articles in the news / media (39%)	Media briefings (49%)
	COVID-19 website (35%)	Media briefings (36%)	COVID-19 website (38%)	COVID-19 website (36%)	COVID-19 website (32%)	COVID-19 website (34%)
Average number of information sources	3.0	2.9	3.2	2.9	2.6	3.1
INFLUENCERS FOR COVID-19	Dr Ashley Bloomfield (58%)	Prime Minister Jacinda Ardern (46%)	Dr Ashley Bloomfield (56%)	Dr Ashley Bloomfield (46%)	Dr Ashley Bloomfield (66%)	Dr Ashley Bloomfield (66%)
	Prime Minister Jacinda Ardern (45%)	Dr Ashley Bloomfield (45%)	Ministry of Health (43%)	Prime Minister Jacinda Ardern (42%)	Minister Chris Hipkins (44%)	Prime Minister Jacinda Ardern (51%)
	Minister Chris Hipkins (38%)	Unite Against COVID-19 platforms (44%)	Prime Minister Jacinda Ardern (37%)	Ministry of Health (31%)	Prime Minister Jacinda Ardern (43%)	Minister Chris Hipkins (49%)
	Ministry of Health (36%)	Ministry of Health (40%)	Minister Chris Hipkins (34%)	Minister Chris Hipkins (26%)	Ministry of Health (34%)	Ministry of Health (34%)
	Unite Against COVID-19 platforms (23%)	Minister Chris Hipkins (25%)	Unite Against COVID-19 platforms (33%)			

Source: Immediate Needs Dip 1 (July 2021)

Q: Where are you getting information from to keep up to date about the New Zealand Government’s public health COVID-19 response, including plans, Alert Level guidelines, the COVID-19 vaccine etc.?

Q: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done?

Base: Total Sample n= 827, 16-24 years n = 56, 25-34 years n = 200, 35-44 years n = 159, 45-54 years n = 109, 55 years + n = 303

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Significantly higher than total sample
Significantly lower than total sample



55 years and over are more motivated and have more concerns around COVID-19 generally

	TOTAL SAMPLE	16- 24 YEARS	25 - 34 YEARS	35 – 44 YEARS	45 - 54 YEARS	55 YEARS +
TOP MOTIVATIONS	Right thing to do to (50%) Avoid another lockdown (47%) Wanting to protect friends / family / whanau (46%) Sense of duty to NZ (45%)	Right thing to do to (44%) Sense of duty to NZ (37%) Avoid another lockdown (33%)	Avoid another lockdown (40%) Right thing to do (39%) Sense of duty to NZ (36%)	Health concerns (41%) Right thing to do (37%) Wanting to protect friends / family / whanau (37%)	Wanting to protect friends / family / whanau (52%) Avoid another lockdown (46%) Right thing to do to (45%)	Right thing to do to (68%) Avoid another lockdown (62%) Sense of duty to NZ (61%) Wanting to protect friends / family / whanau (61%)
TOP CONCERNS (AROUND COVID-19 GENERALLY)	Effect on the NZ economy (49%) New COVID-19 variants (47%)	Effect on the NZ economy (49%) New COVID-19 variants (47%)	Effect on the NZ economy (45%) New COVID-19 variants (38%) Effect on the mental health of New Zealanders (38%)	Effect on the NZ economy (47%) New COVID-19 variants (42%) Not knowing when we will return to normal (36%) New Zealand's vaccination plan and rollout (36%)	New COVID-19 variants (53%) Effect on the NZ economy (43%)	They are concerned about the most things across the age groups. Effect on the NZ economy (60%) New COVID-19 variants (60%)

Source: Immediate Needs Dip 1 (July 2021)

Q: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines?

Q: What are you thinking about in terms of the impact of COVID-19 in New Zealand?

Base: Total Sample n = 827, 16-24 years n = 56, 25-34 years n = 200, 35-44 years n = 159, 45-54 years n = 109 55 years + n = 303

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Significantly higher than total sample
 Significantly lower than total sample

TRA

IMPLICATION

74% of New Zealanders are likely to get vaccinated or are already vaccinated

While this is encouraging, there are 6% who are *Unengaged*. They will be a difficult group to motivate – they are less engaged with information in general, and are less likely to have a view of what the future will be like with vaccinations.

A large, stylized white number '3' is positioned in the upper left quadrant of the image. The background is a deep blue with a white diagonal line running from the top left towards the bottom right. The number '3' is centered within the triangular area formed by the diagonal line and the top and left edges of the frame.

3

**Behaviour and
compliance**

TRA

Even with slightly more concern, there hasn't been much change in willingness to comply with COVID-19 guidelines

But we do see a significant decrease in willingness to contact Healthline if unwell with COVID-19 symptoms.

WILLINGNESS TO COMPLY – KEY COVID-19 HEALTH BEHAVIOURS

	Very willing to comply	+/- vs May-21
Staying home if you're feeling sick or unwell, including staying off work	72%	-3%
Using a mask on public transport	69%	+2%
Contacting Healthline or your doctor if unwell with COVID-19 symptoms	63%	-9% ▼
Get a COVID-19 test if unwell	56%	n/a
Using NZ COVID Tracer app to scan in	56%	-2%

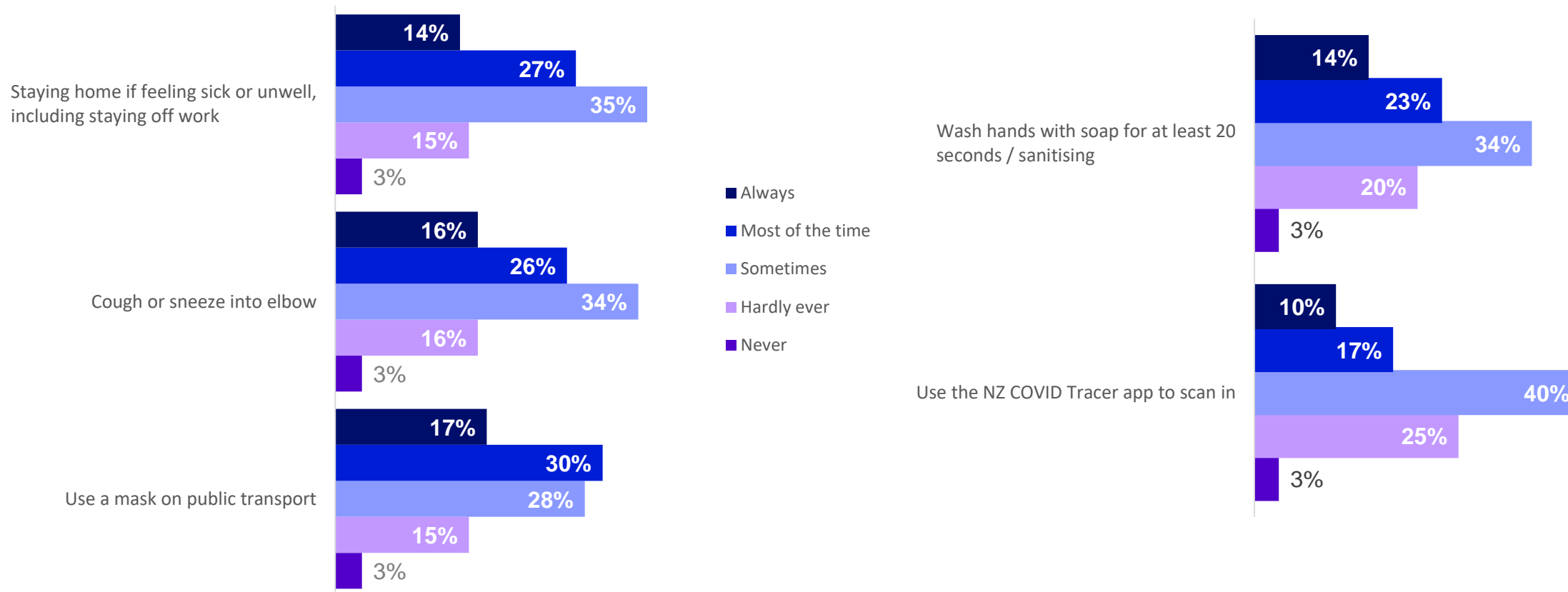
Source: Immediate Needs Dip 1 (July 2021)
 Q: How willing are you to do the following? <STATEMENT>
 Base: July-21 total sample n=827, May-21 total sample n=1853



Despite high willingness, compliance across all COVID-19 health behaviours could be more consistent

Particularly when it comes to using the NZ COVID Tracer app

REPORTED COMPLIANCE – COVID-19 HEALTH BEHAVIOURS



Source: Immediate Needs Dip 1 (July 2021)
 Q: How often do you think other people in New Zealand do the following?
 Base: July-21 total sample n=827, May-21 total sample n=1853

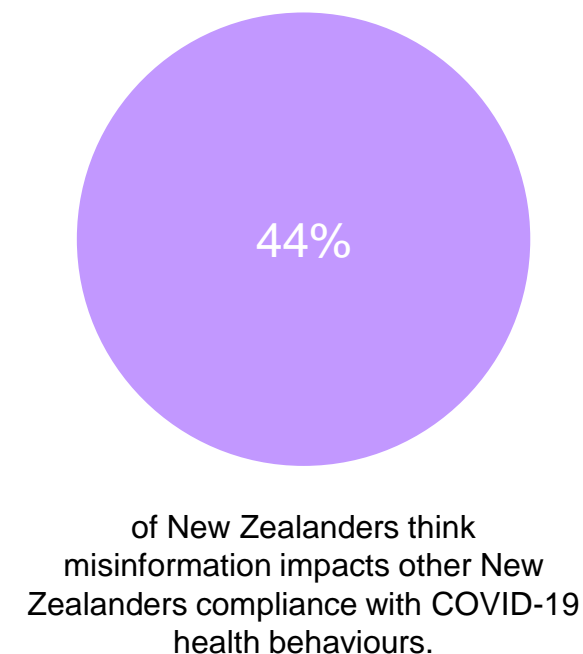
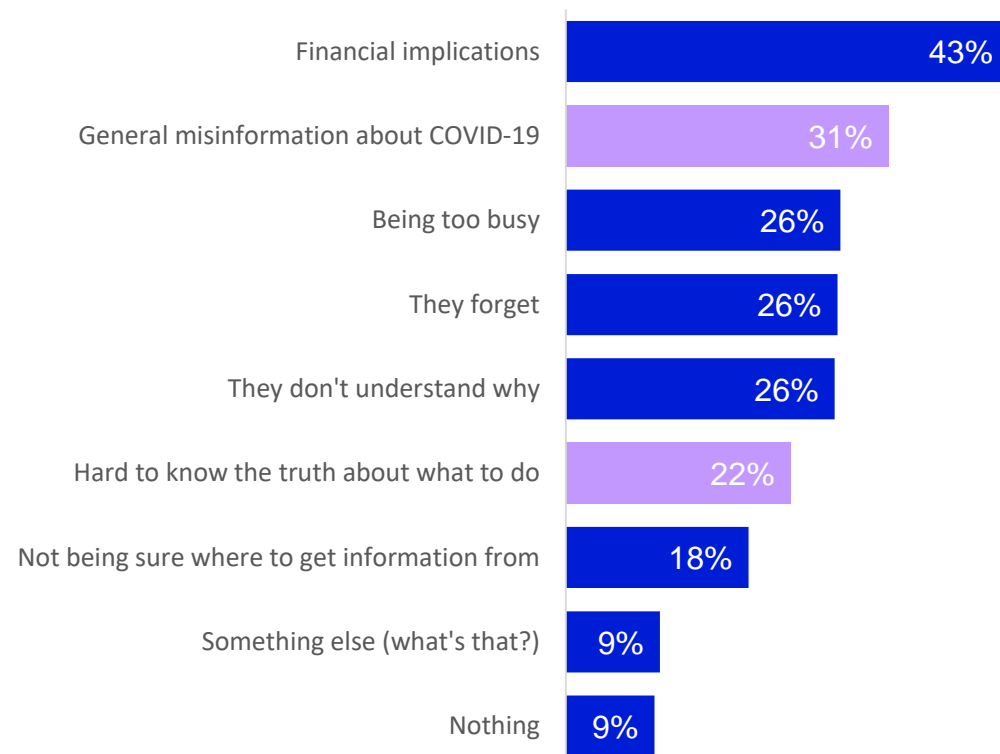
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Note: We use projective measures here to get a more accurate read on an individuals real behaviour.



Financial implications and misinformation are thought to be key barriers to compliance with COVID-19 health guidelines

IMPACTS ON COMPLIANCE ON KEY COVID-19 HEALTH BEHAVIOURS (staying at home if sick, getting a COVID-19 test if unwell, using the NZ COVID Tracer App to scan in)



Source: Immediate Needs Dip 1 (July 2021)

Q: Which of the following, if anything, do you feel impacts other New Zealanders undertaking COVID-19 health behaviour (e.g. staying at home if sick, getting a COVID-19 test if unwell, using the NZ COVID Tracer App to scan in etc.)?

Key: Misinformation = general misinformation about COVID-19 + hard to know the truth about what to do

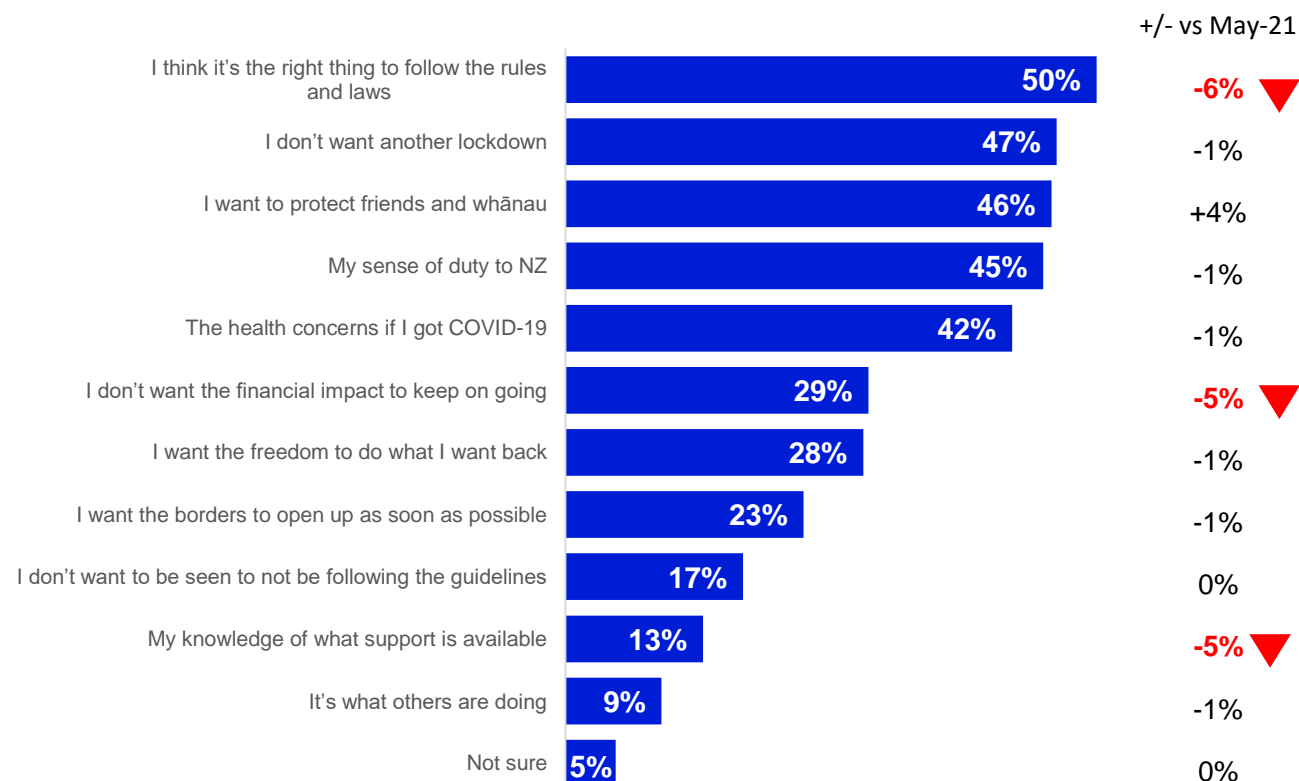
Base: July-21 total sample n=827

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Thinking it's the 'right thing to do' remains the biggest motivator to following COVID-19 guidelines

This is followed by wanting to avoid another lockdown, protecting friends and whanau, and a sense of duty

COVID-19 GUIDELINE COMPLIANCE MOTIVATORS



Fairness is a key value that underpins New Zealanders and we are seeing this reflected in the key motivators – following the rules and sense of duty.

Avoiding another lockdown and protecting friends and family are other key compliance motivators.

Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)
 Q: Which of the following are most likely to make you want to follow the Government's public health COVID-19 guidelines?
 Base: July-21 total sample n=827, May-21 total sample n=1853

Brand and information

4

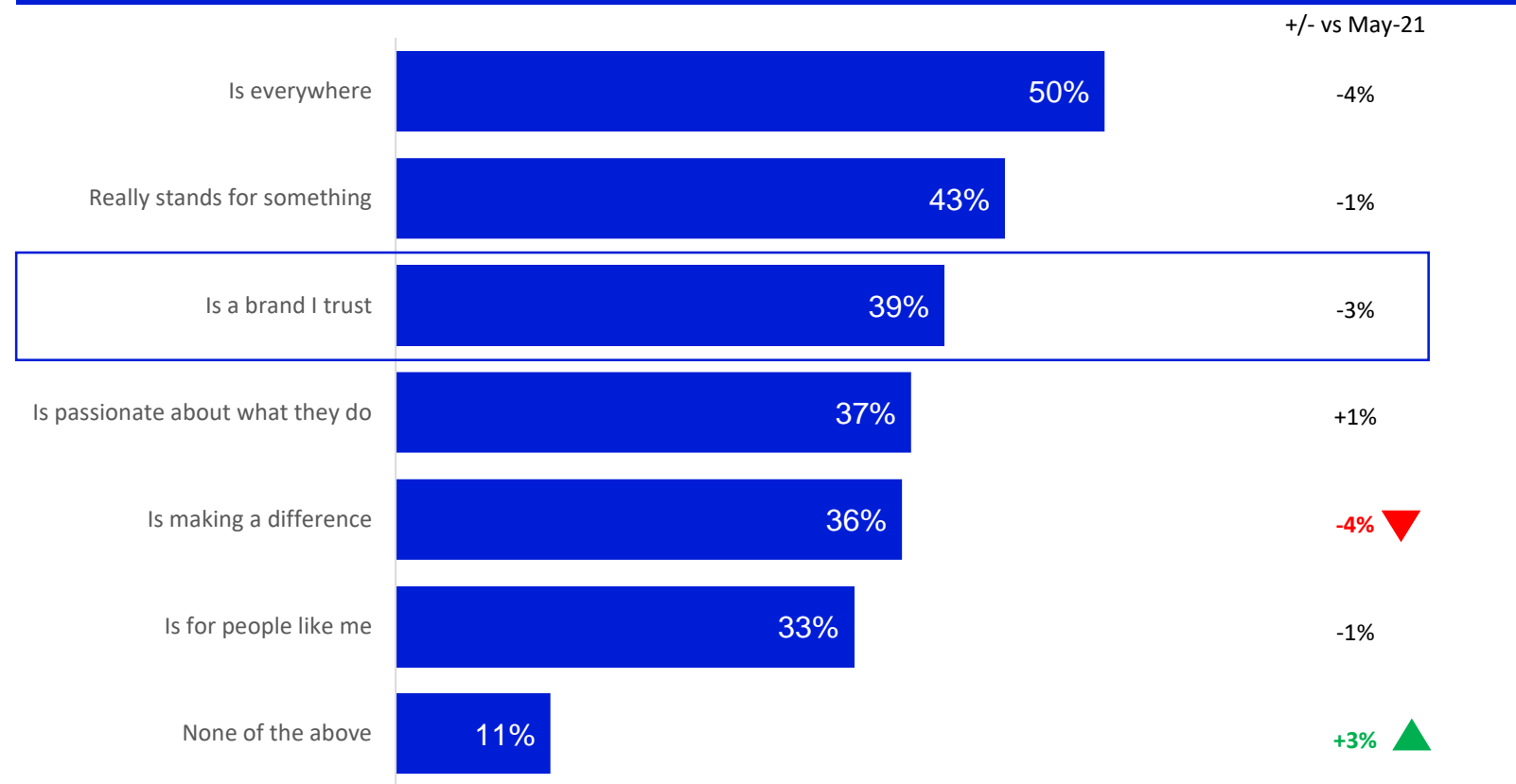
TRA

The 'Unite Against COVID-19' brand remains stable and strong

ASSOCIATIONS WITH THE 'UNITE AGAINST COVID-19' BRAND

The following groups have significantly lower trust of the UAC brand:

- Rural (28%)
- Upper North Island (30%)
- Vaccine segments: Unlikely (15%), Unengaged (11%), Rejectors (15%)



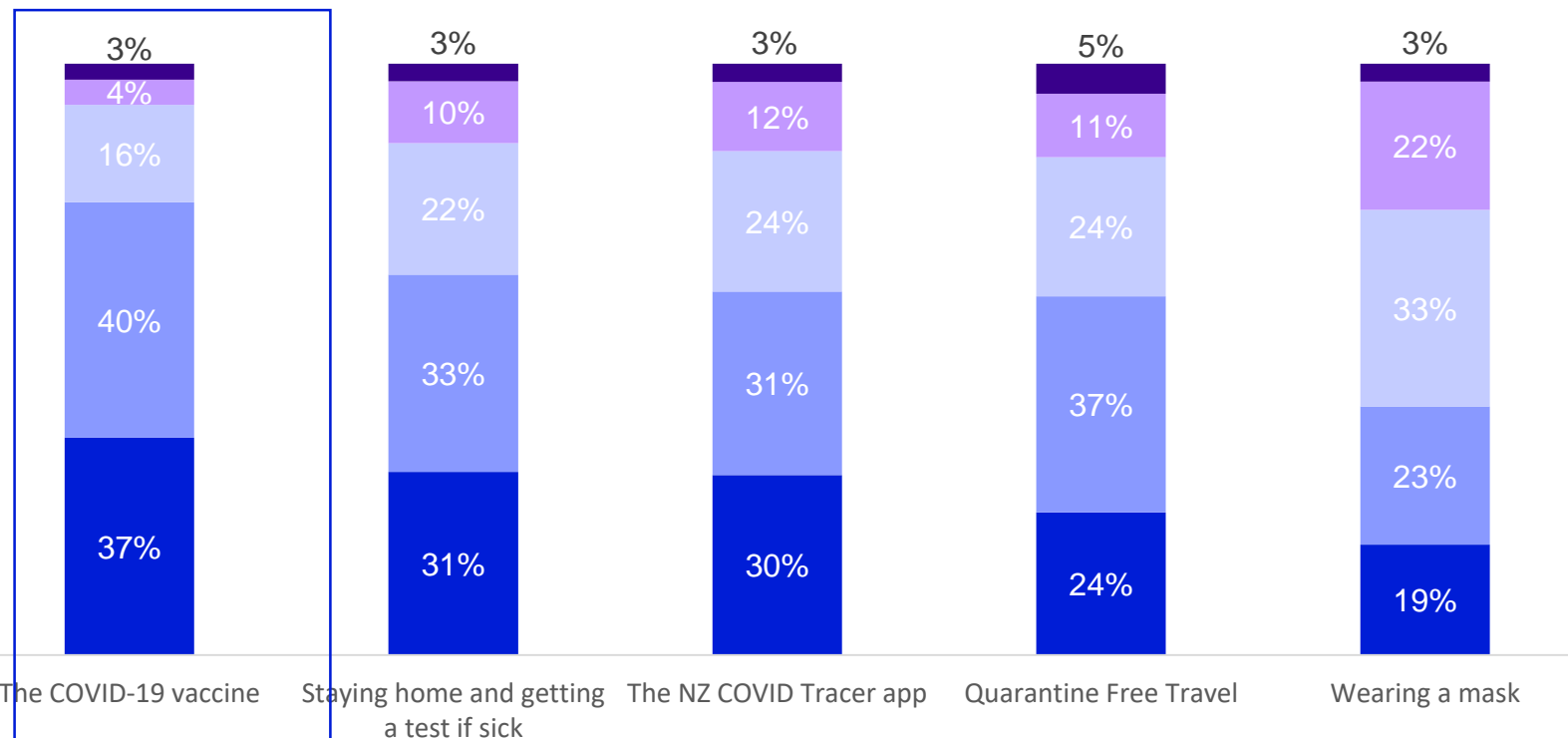
Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)
 Q: Do you feel that Unite Against COVID-19 ... <STATEMENT>?
 Base: July-21 total sample n=827, May-21 total sample n=1853

Communications around the COVID-19 vaccine are most prominent, with more New Zealanders saying they're seeing or hearing about it all the time

VISIBILITY OF KEY COVID-19 MESSAGING

Whereas messaging around mask wearing has been less top of mind and less visible – reflecting the COVID-19 situation in New Zealand.

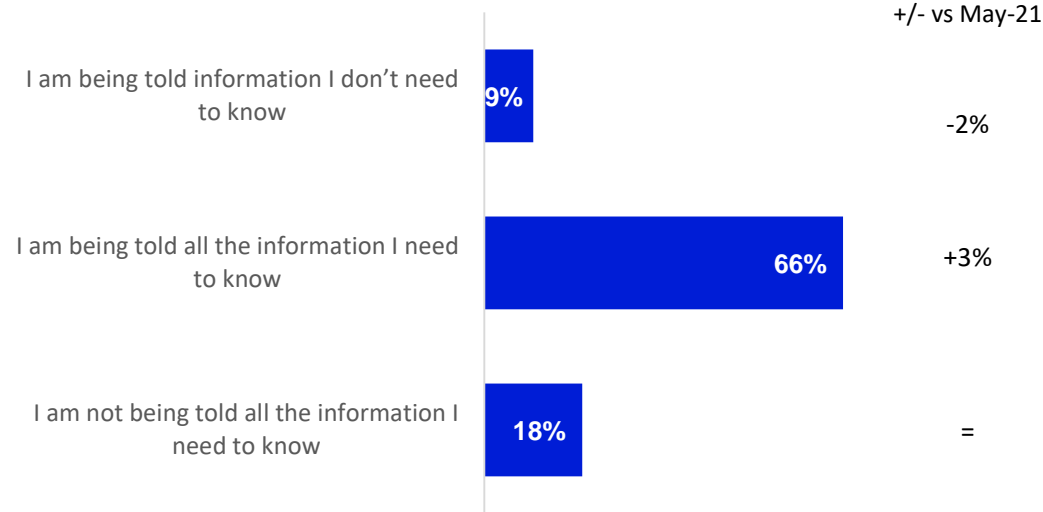
- I don't know
- You hardly ever see or hear about it
- You see or hear about it a little
- You see or hear about it a lot
- You see or hear about it all the time



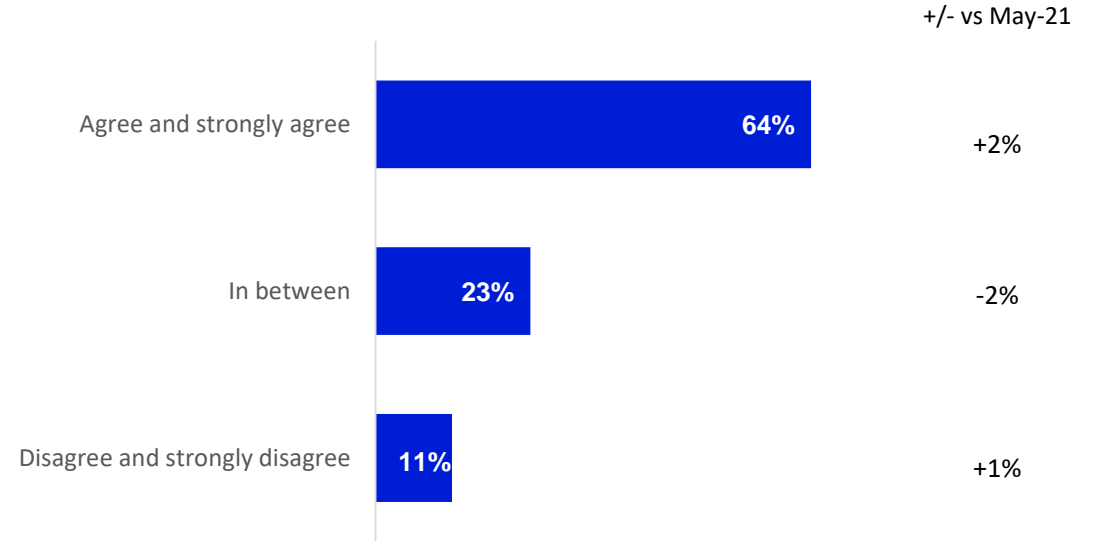
Source: Immediate Needs Dip 1 (July 2021)
 Q: Lately, how much are you seeing or hearing about ...
 Base: July-21 total sample n=827
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New Zealanders mostly feel like they're getting the right amount of information; access to information remains unchanged

QUALITY OF INFORMATION ABOUT COVID-19



AGREE YOU HAVE ACCESS TO THE INFORMATION YOU WANT AND NEED ABOUT COVID-19



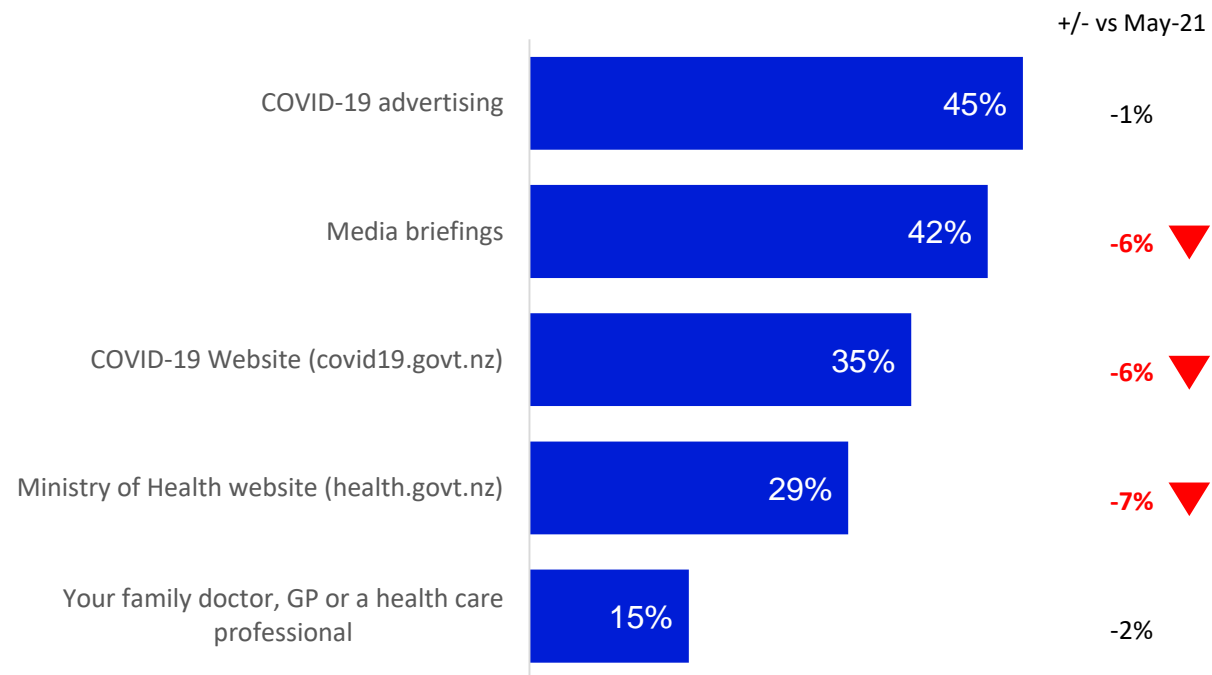
Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)
 Q: How do you feel about the quality of information about COVID-19 that is currently being provided on what you need to do?
 Q: From everything you've seen or heard about COVID-19 do you agree that you have access to all the information you want and need?
 Base: July-21 total sample n=827, May-21 total sample n=1853

Government and Healthcare Professionals remain the leading information source for New Zealanders

INFORMATION SOURCES – GOVERNMENT AND HEALTHCARE PROFESSIONALS (80%)

However, we have seen some significant declines since May in specific channels – Media briefings, the COVID-19 website and the Ministry of Health website.

With no new COVID-19 outbreaks in New Zealand since March, it's unsurprising to see a decline in the reach of these channels.



▲ ▼ Significantly higher / lower than May-21

Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)

May 2021 Q: Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, Alert Level guidelines, etc.?

July 2021 Q: Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, Alert Level guidelines, the COVID-19 vaccine etc.?

Base: July-21 total sample n=827, May-21 total sample n=1853

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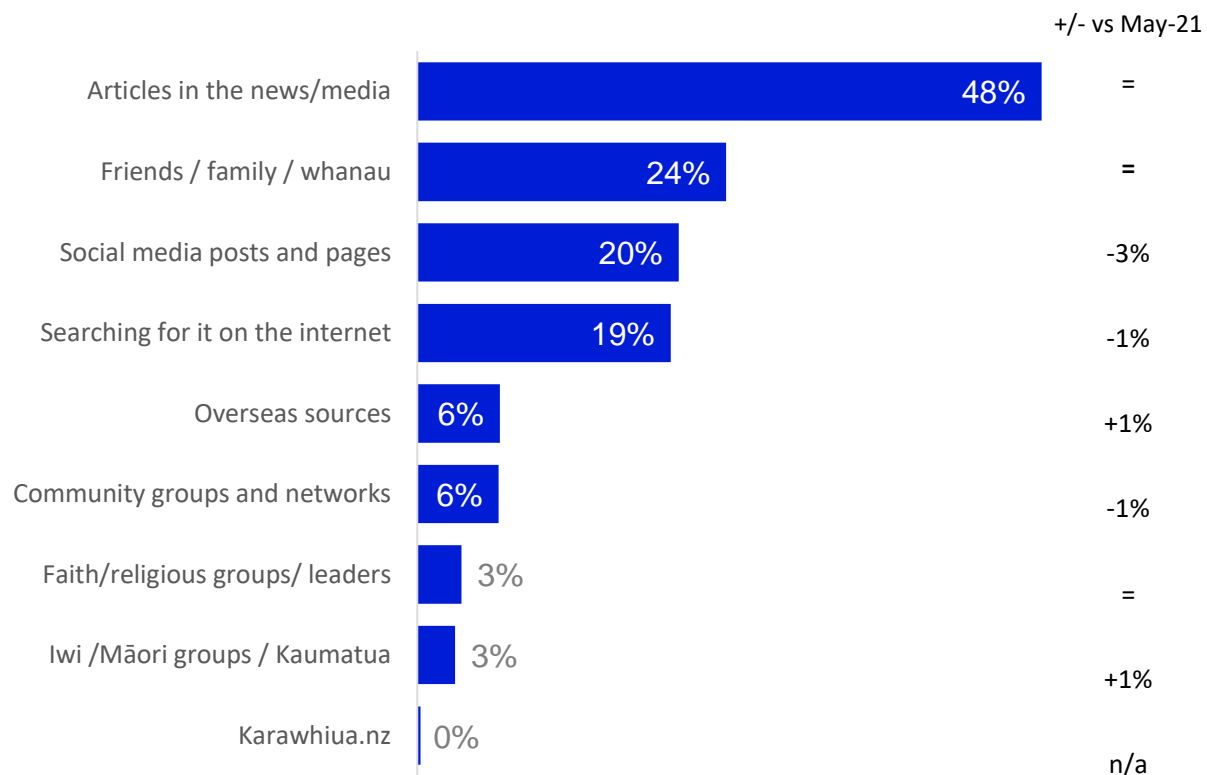
*May comparisons are indicative only. The question wording changed slightly in July 2021 to include 'the COVID-19 vaccine'.



Meanwhile, non-Government and Healthcare professional sources are stable

Articles in the news and media remain the leading information source by far, followed by friends / family / whānau.

INFORMATION SOURCES – NON-GOVERNMENT AND HEALTHCARE PROFESSIONALS (73%)



Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)

May 2021 Q: Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, Alert Level guidelines, etc.?

July 2021 Q: Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, Alert Level guidelines, the COVID-19 vaccine etc.?

Base: July-21 total sample n=827, May-21 total sample n=1853

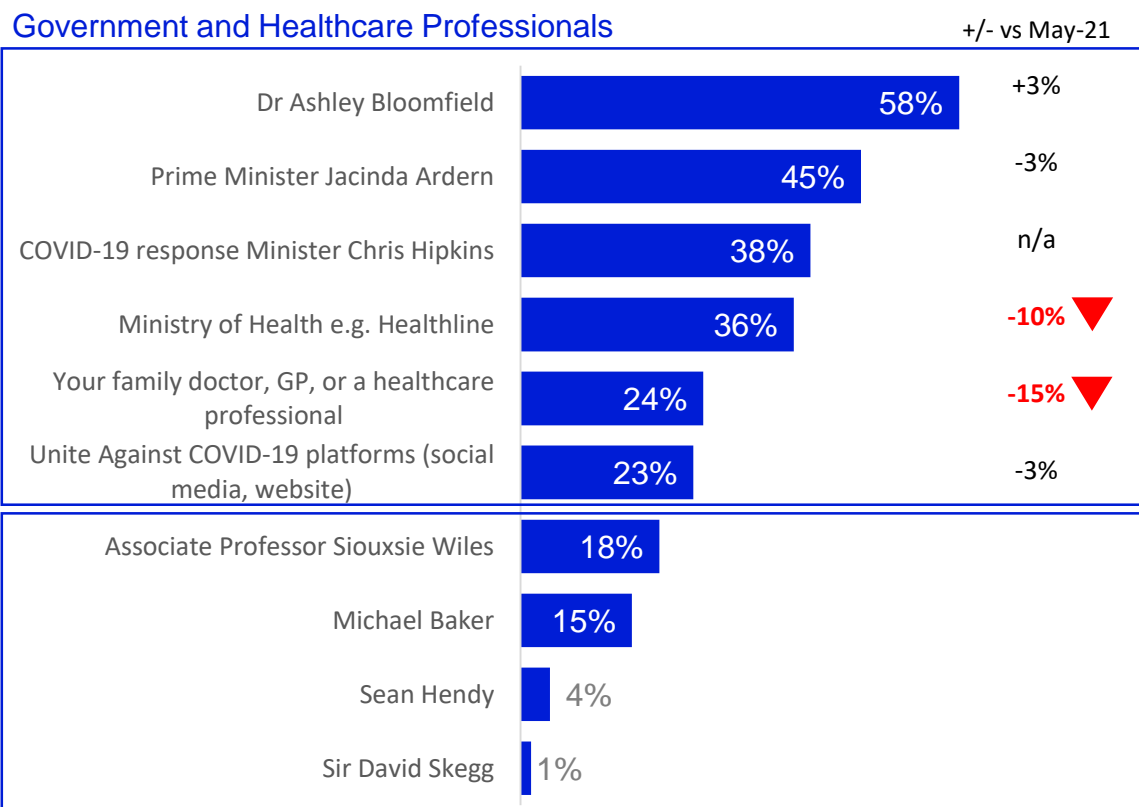
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*May comparisons are indicative only. The question wording changed slightly in July 2021 to include 'the COVID-19 vaccine'.

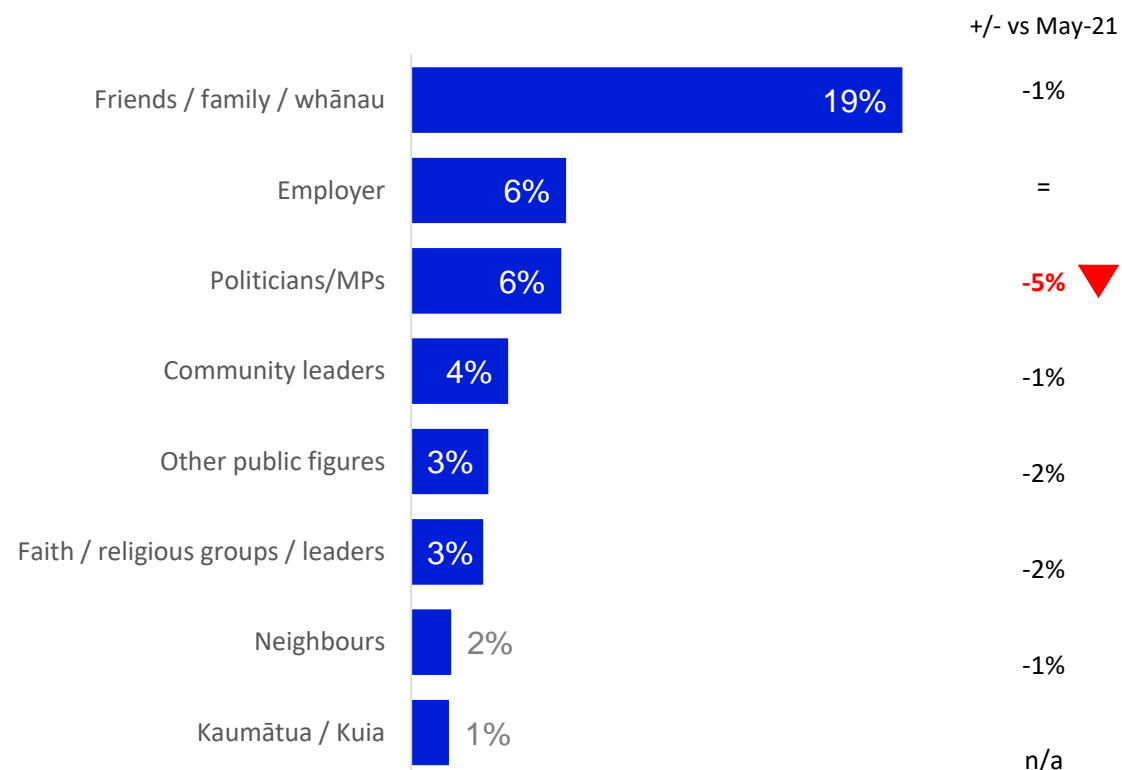
TRA

Most influencers are stable, but we have seen some declines in reach for Ministry of Health and Healthcare Professionals

INFLUENCERS – GOVERNMENT AND HEALTHCARE PROFESSIONALS (82%) & ACADEMICS (26%)



INFLUENCERS – OTHER INFLUENCERS (32%)

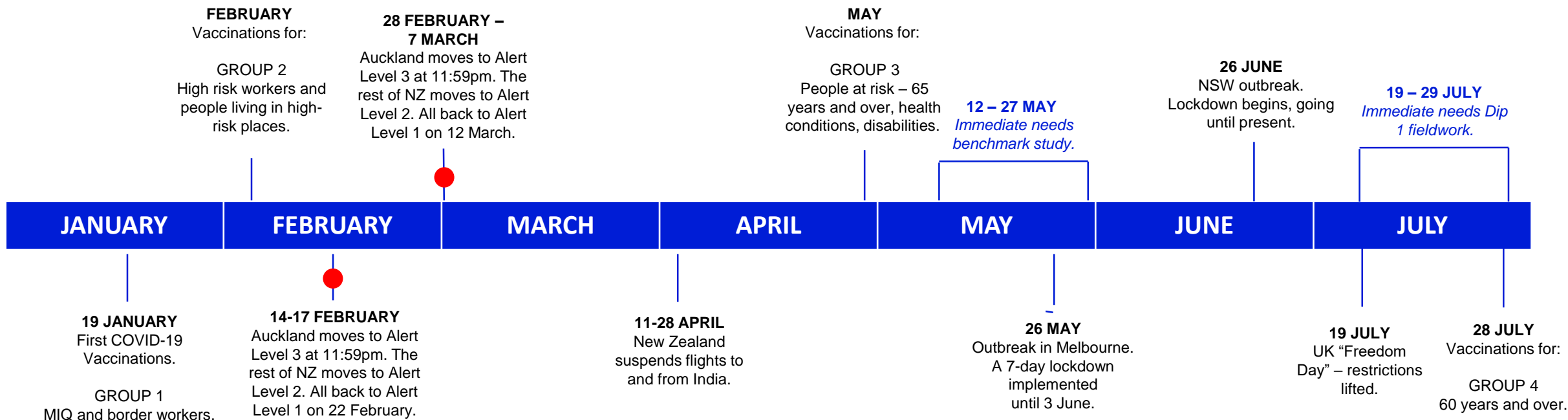


Source: Immediate Needs Benchmark (May 2021) & Immediate Needs Dip 1 (July 2021)
 Q: Whose opinion do you listen to or seek out in regards to COVID-19 in New Zealand and what is being done?
 Base: July-21 total sample n=827, May-21 total sample n=1853

Ngā Mihi

TRA

Timeline of key events – January 2021 to July 2021



Vaccine Segments – Top Information Sources

TOTAL	VACCINATED OR PENDING	GOOD TO GO	OKAY WITH IT	UNLIKELY	UNENGAGED	REJECTORS
Articles in the news and media (48%)	Articles in the news / media (49%)	Articles in the news / media (52%)	COVID-19 advertising (46%)	Articles in the news / media (59%)	COVID-19 advertising (37%)	Articles in the news / media (38%)
COVID-19 advertising (45%)	COVID-19 advertising (46%)	COVID-19 advertising (48%)	Articles in the news / media (43%)	COVID-19 advertising (53%)	Articles in the news / media (37%)	COVID-19 advertising (33%)
Media briefings (42%)	Media briefings (45%)	COVID-19 website (45%)	Media briefings (43%)	Media briefings (44%)	Friends / family / whānau (32%)	Media briefings (30%)
COVID-19 website (35%)	COVID-19 website (40%)	Media briefings (44%)	Ministry of Health website (30%)	COVID-19 website (31%)	Media briefings (31%)	Ministry of Health website (25%)
Ministry of Health website (29%)	Ministry of Health website (34%)	Ministry of Health website (30%)	COVID-19 website (29%)	Friends / family / whānau (28%)	Searching for it on the internet (27%)	Social media posts and pages (19%)
Friends / family / whānau (24%)	Friends / family / whānau (22%)	Friends / family / whānau (29%)	Friends / family / whānau (23%)	Social media posts and pages (27%)	COVID-19 website (24%)	Searching for it on the internet (19%)
Average number of sources 3.0	3.1	3.3	2.8	3.0	2.5	2.3

Source: Immediate Needs Dip 1 (July 2021)

July 2021 Q: Where are you getting information from to keep up to date about the New Zealand Government's public health COVID-19 response, including plans, Alert Level guidelines, the COVID-19 vaccine etc.?

Base: Total Sample n= 827, Vaccinated or pending n=333, , Good to go n=175, Okay about it n=114, Unlikely n=41, Unengaged n=53, Vaccine rejectors n=56

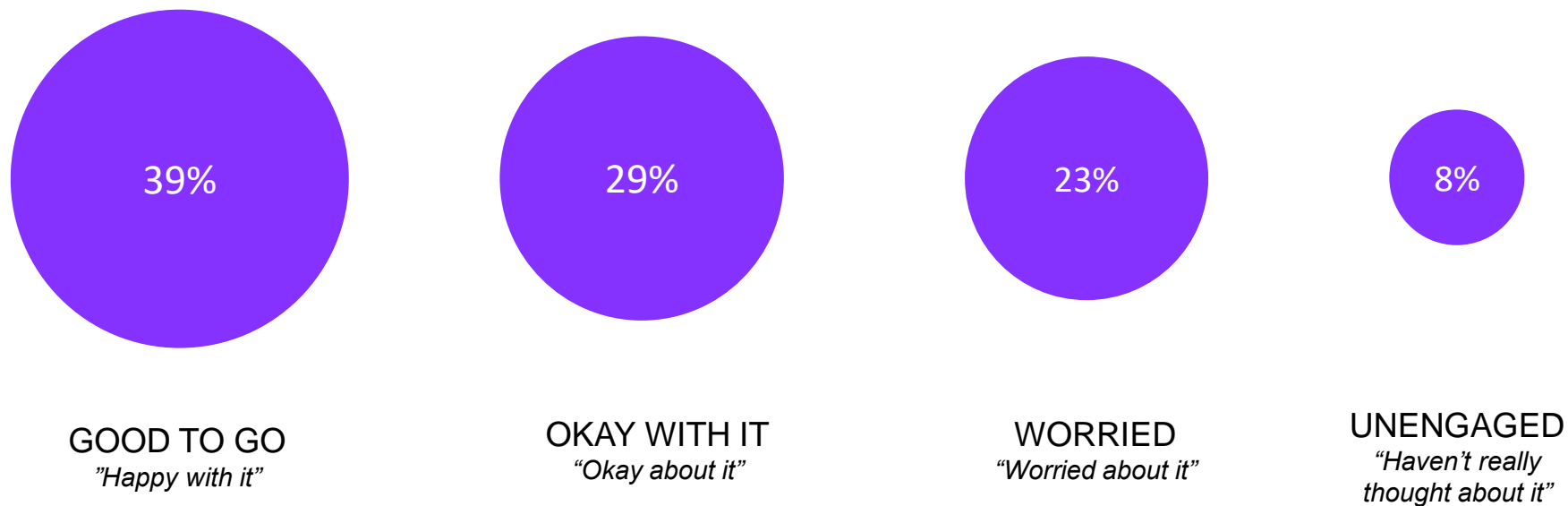
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Significantly higher than total sample

TRA

May Vaccine Segments & construction

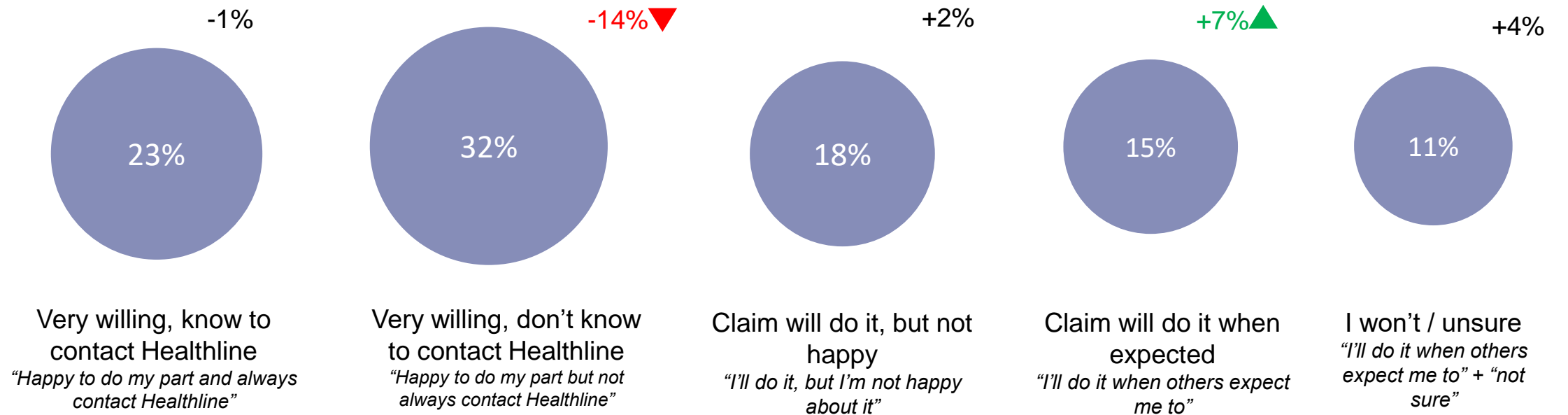
HOW DO YOU FEEL ABOUT GETTING THE COVID-19 VACCINE?



Source: DPMC Immediate Needs Benchmark (May 2021)
Q: How do you feel about the following? <STATEMENT> [getting the COVID-19 vaccine]
Key: Good to go = "happy with it", Okay with it = "okay about it", Worried = "worried about it", Unengaged = "haven't really thought about it"
Base: Total sample n=1,853
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Shifts in Test Segments from May 2021 to July 2021

HOW WILLING ARE YOU TO GET A COVID-19 TEST IF YOU FEEL UNWELL WITH COVID-19 TYPE SYMPTOMS?



Source: DPMC COVID-19 Summer tracking (December 2020) & DPMC immediate Needs Dip 1 (July 2021)

Q: How willing are you to do the following? <STATEMENT> NET: T2B Do it all the time (very willing, happy to comply, I do it all the time but I'm not that happy about it)

Q: How often do you think other New Zealanders are doing the following <Contact Healthline or doctor if feeling unwell with COVID-19 type symptoms>

Key: "Very willing, contact Healthline" = very willing, happy to do my part + always contact Healthline; Very willing, don't contact Healthline = very willing, happy to do my part + not always contact Healthline

Base: December 2020 total sample n=800, July 2021 total sample n=827

▲ ▼ Significantly higher / lower than May-21